



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

Trustee Education Institute Draft Schedule

September 23-25, 2020

Schedule is subject to change.

Note: This event is virtual. Please have access to a computer and webcam. Event sessions will be held from 11:30 am to 4 pm each day. All times listed are in Eastern Standard Time. Additional speakers will be confirmed and announced in coming weeks. Ask the Lawyer and Ask the Accountant consultations will be offered at a time to be announced.

DAY ONE: WEDNESDAY, SEPTEMBER 23

11:30–11:45 am | Introductions & Schedule Overview

A welcome from NCFP staff leadership and preview of Day One of the Institute.

11:45 am–12:30 pm | Translating Shared Values into Action

What motivates you and your family to give? Are you called to advance a particular grantmaking mission? Or are you interested in creating an opportunity for family members to come together and strengthen family ties through philanthropy and service to others? Or is it both? Regardless, the ability to work together with other members of your family to translate values into action is fundamental to your success. In this interactive session, participants will hear stories of multi-generational families and join small group discussions to share personal perspectives on family values, evolving mission and community needs, and family engagement.

Confirmed Speakers:

- *Kimberly Myers Hewlett, Board Member, Myers Family Foundation and Flora Family Foundation*
- *Jaimie Mayer, Board Chair, Nathan Cummings Foundation*
- *Maya Patel, Executive Chair, Tarsadia Foundation*
- *Nick Tedesco, President and CEO, National Center for Family Philanthropy*

12:30–12:40 pm | Break

12:40–1:40 pm | Managing Family Dynamics

Family philanthropy is complicated. It's an effort that solves for many distinct and diverse opinions—one that often creates conflict. However, conflict is neither

inherently good nor bad—it's something to be understood and managed. In this session, participants will explore situations where families might find themselves falling into the avoidance trap, and identify useful strategies for avoiding avoidance and other related tips and tools for managing family conflict.

Confirmed Speakers:

- *Danielle Oristian York, Executive Director & President, 21/64*
- *Jennie Zioncheck, Senior Director, 21/64*

1:40–1:45 pm | Technology Break

1:45–2:45 pm | Good Governance: A Roadmap for Success

Effective governance is the mainstay for a successful family philanthropy effort. But what is governance and how is it adopted into a giving practice? Join family philanthropy experts and practitioners to explore how to adopt principles, policies and practices that will organize your giving. We encourage all participants to bring questions and dilemmas to this interactive conversation on how orient your family for success through proper decision-making strategies.

Confirmed Speakers:

- *Ashley Snowdon Blanchard, Senior Associate, Lansberg Gersick & Associates and Trustee, Hill-Snowdon Foundation*

2:45–3:00 pm | Break

3:00–3:45 pm | Donor Perspectives: The Importance of Being Fearless with Jean Case

Jean Case, the Chairman of the National Geographic Society and CEO of the Case Impact Network, is a businesswoman, investor, philanthropist, and internet and impact investing pioneer who advocates for the importance of embracing a more fearless approach to innovate and bring about transformational breakthroughs. Jean will join NCFP President Nick Tedesco to share her experiences and illuminate five principals for a life of purpose and bold action.

Confirmed Speakers:

- *Jean Case, Chair National Geographic and CEO, Case Impact Network and Case Foundation*
- *Nick Tedesco, President and CEO, National Center for Family Philanthropy*

3:45–4:00 pm | Quick Check Out & Announcements

A brief recap of the day and preview of Day Two of the Institute.

DAY TWO: THURSDAY, SEPTEMBER 24

11:30–11:45 am | Opening & Announcements

A welcome from NCFP staff leadership and preview of Day Two of the Institute.

11:45 am–1:00 pm | Fiduciary Responsibilities and Legal Pitfalls

Join this session to better understand the fundamental and complex federal and state laws regulating charitable giving including self-dealing, payout, fiscal agency, excise tax, required filings, and much more. Arcane concepts made accessible—and fun—by one of the nation’s leading experts on family foundation tax law.

Confirmed Speakers:

- *Andrew Schulz, General Counsel, Arabella Advisors*

1:00–1:15 pm | Break

1:15–2:00 pm | Personal Journeys Towards Diversity, Equity, and Inclusion

Promoting diversity, equity, and inclusion is an essential strategy for all philanthropists who seek to deepen impact and ensure that philanthropic goals and desires translate to enduring results. In this session, participants will hear from NCFP’s current class of Fellows as they share their personal journeys of learning and discovery, as well as their tips and suggestions to fully embrace a commitment to equity and inclusion in giving and governance strategies.

Confirmed Speakers:

- *Mary Mountcastle, Board Member, Mary Reynolds Babcock Foundation*
- *Kelly Nowlin, Trustee, Surdna Foundation*
- *June Wilson, Executive Director Emerita and Board Member, Quixote Foundation*

2:00–2:10 pm | Break

2:10–2:55 pm | Breakout Sessions

Breakout sessions will include dynamic interactive workshops featuring foundation leaders and program partners from The Philanthropy Workshop, 21/64, and more!

Confirmed Speakers:

- *Renee Kaplan, Chief Executive Officer, The Philanthropy Workshop*
- *Danielle Oristian York, Executive Director & President, 21/64*

2:55–3:00 pm | Technology Break

3:00–3:45 pm | Donor Perspectives: A Conversation with Irene Pritzker and Liesel Pritzker Simmons

Family philanthropy is an ever-evolving journey—one that often has points of unity and divergence. Many giving families will reach a point in their history when individual family members are keen to explore their own identity and chart their own path; however, it doesn't mean that partnership and collaboration is lost. In this session, participants will hear two generations of philanthropists discuss strategies for impact as well as the challenge of balancing personal and shared interests to support successful philanthropic initiatives.

Confirmed Speakers:

- *Irene Pritzker, President and CEO, IDP Foundation*
- *Liesel Pritzker Simmons, Co-Founder and Principal, Blue Haven Initiative*
- *Nick Tedesco, President and CEO, National Center for Family Philanthropy*

3:45–4:00 pm | Daily Check Out & Announcements

A brief recap of the day and preview of Day Three of the Institute.

DAY THREE: FRIDAY, SEPTEMBER 25

11:30–11:45 am | Opening & Announcements

A welcome from NCFP staff leadership and preview of the final day of the Institute.

11:45 am–12:45 pm | All Things Numbers: Investments and Accounting

Philanthropy is more than giving of one's time and money; it is the responsible stewardship of capital for the greater good. During this session, experts will explore prudent investment strategies to ensure the growth and protection of endowment and foundation portfolios. It will also explore the necessary reporting requirements to remain compliant with state and federal laws. We promise to make this fun!

12:45–1:30 pm | Donor Perspectives

Hear from prominent donors and families as they reflect on lessons learned for creative philanthropy and learning from mistakes. Past institute speakers include Susan Packard Orr of the David and Lucile Packard Foundation, David Dodson from MDC, Inc., Curtis Meadows from the Meadows Foundation and leadership from the Hill-Snowdon Foundation.

1:45–1:55 pm | Break

1:55–2:40 pm | Breakout Sessions

Breakout sessions will include dynamic interactive workshops featuring foundation leaders and program partners from The Philanthropy Workshop, 21/64, and more!

Confirmed Speakers:

- *Renee Kaplan, Chief Executive Officer, The Philanthropy Workshop*
- *Danielle Oristian York, Executive Director & President, 21/64*

2:40–2:45 pm | Technology Break

2:45–3:35 pm | Donor Perspectives: A Conversation with Valerie Rockefeller

How do you bring your personal passions and perspectives to a shared philanthropic effort? How do you forge an identity that is unique but inclusive of your family? How do you balance the opportunities and expectations of legacy? And what tools are available to make the most of your philanthropic assets and capital? NCFP President Nick Tedesco will explore these and other timely questions in this intimate conversation with long-time friend and colleague Valerie Rockefeller.

Confirmed Speakers:

- *Valerie Rockefeller, Trustee, Rockefeller Brothers Fund*
- *Nick Tedesco, President and CEO, National Center for Family Philanthropy*

3:35–4:00 pm | Closing & Future Opportunities for Engagement

Hear about ongoing opportunities to connect and learn from NCFP and its partners, and learn how to sign up for peer cohorts that will be meeting following TEI in the areas of next-gen leadership, racial equity, and strategic grantmaking.